Scott Taylor, EdD: Leadership in review

President & Executive Director of Monroe Institute
March of 2019 to March of 2021
COVID-19 Pandemic ran from March 2020 to March 2021

It was a team effort.

Finances to keep Monroe Institute from bankruptcy
Left Monroe in the best financial position of any time in its history
- Left $4.6 million in the bank with no debt
- Increased Monroe net worth from $3.2 million (2019) to $6.2 million (2021) during a pandemic
- Raised $4.0 million, a record for Monroe.
  - Raised $1.4 million from nontraditional sources
  - Raised $2.6 million from donations

Donations in partnership with Lori Jacobwith (Director of Development & Chief Operating Officer)
- Secured $2.6 million in donations in two years
- Increased donor retention rate from **35% to 50%**
- Secured the **three largest donations** in Monroe's history.
- Increased donations **8x** ($1.3 million/year) over the prior five-year average ($132,000/year)
- Increased reoccurring monthly donations from $2,847 in 2019 to **$17,990 in 2020**
- Doubled reoccurring donors from 20 in 2019 to **44 in 2020**
- Increased active donors from 276 in 2019 to **387 in 2020**
- Created relationships with over **800 donors in 2020**

Trainer engagement
- For the prior 10 years, there were no meetings that included trainers
- During my two years, trainers participated in more than 100 meetings

Stand on our own two feet
- Adopted new logo to boldly say we are different than Hemi-Sync (the company spun off from Monroe)
- Developed, tested and approved more than 50 new audio technologies as part of Monroe Audio Support

Agility
- Pivoted from being a residential retreat center to holding our first virtual retreat in just 13 weeks. The closure of residential programs occurred in March 2020 due to COVID-19. We ran our first virtual retreat in June 2020.
- Received outstanding reviews

Living the Mission
- Conceived, designed and produced a working app (beta) to involve millions of users, compared to our average of 1000 residential participants.

Diversity, Equity and Inclusion
- Promoted three BIPOC persons to management
- Developed powerful statement on race to be used internally

Key brand asset
- Saved a key brand asset after retirement of Bill Buhlman by developing OBE Spectrum, which is one of the centerpieces of Monroe curriculum
- Updated curriculum to recognize a spectrum of techniques / experiences

Values
- Co-created with staff the first ever statement of organizational values: Discovery, Empowerment, Excellence, Service and Respect

Firsts for Monroe:

Finance
- Created accurate and reliable budgeting using "zero based" technique
- Achieved four "clean" audits in a row (2018-2021)
- Used short term contractors to keep staff levels low, expenses down, quality high

Marketing
- Attracted 350,000 new users of free online meditations (as of March 2021)
- Worked with TikTok "influencer" Stephanie Forlini to garner 22.6 million hits for #MonroeInstitute
- Recorded our own meditations, exercises and videos to connect more personally with alumni and donors
- Used videos and blogs to explain deeper changes at Monroe

Programming
- Created new Virtual Retreats in response to pandemic
- Produced first-ever online professional conference
- Launched archive website for Monroe history
- Wrote trainer manuals for teaching online
- Developed workbooks for program participants
- Experimented with Masterclass webinars
- Tested new Monroe Audio Support (MAS) technology and title concepts with online meditations
- Started project to rename MAS that better conveyed its power. (in process)
- Initiated worldwide meditations for peace and healing

Capacity Building
- Upgraded communication and project technology for use in remote environment: Slack / Trello
- Upgraded donor software to state-of-the-art Bloomerang donor software
- Worked with contracted tech support (PJ Networks) to change their model of delivery to adapt to pandemic reality requiring "work from home."
- Upgraded tech (laptops) for use at home – staff no longer need to use their home computers
- Merged LCN and Outreach trainer groups for more communication and better tie to the mother ship

- Installed a listening / meditation room for the testing of new MAS signals by staff
- Planned and executed registration process so that when we have significantly more registrations, staff can handle the load. (in process)
- Move all data to the cloud for security and ease of access (in process)

Donations
- Called every donor to Monroe, establishing personal relationships with each
- Created and launched first ever capital campaign to raise $13 million in three years
- Created first ever strategic plan for increasing donations
- Encouraged participants to donate their deposits when switching or canceling

Strategic Planning
- Created Vision for the Future (Campaign for App)
  - Concept: strategic direction to include both App and web-based learning platform
  - Presentation of plan: Donor meetings for advice and relationship building
- Created simplified "Strategic Imperatives" (strategic plan) that everyone could understand and support. These were:
  - Increase number of participants using Monroe services
  - Improve the customer experience
  - Create additional streams of income
- Shared strategic plan with staff (past plans were confidential between the board and CEO)

What do we stand for? / Culture / Communication
- Formulated broadly-supported Diversity, Equity and Inclusion (DEI) statement (approved by board for internal use only)
- Adopted media guidelines that made clear the role of Monroe vs. posting person (rejected by board – felt guidelines shouldn't apply to board)
- Reinforced consistently new cultural norms:
  - Three strategic imperatives
  - Monroe values
- Zoom staff-board parties to celebrate successes
  - Foster collegial relationships vs. staff working in silos
- Recommended policy on compensation to raise staff salaries to area average (board rejected)
- Posted statement in response to January 6, 2021, attack on the US capitol: the Monroe Institute is apolitical and violence is not OK
- Installed Bob Monroe timeline graphics in DFH to give visitors a sense of his legacy in context.

HR
- Analyzing compensation through the lens of
  - DEI (not approved by board)
  - Parity (board approved 50% of request)
    - Gave these partial raises in Feb. 2021
    - This amount was still 3x more money for raises than any previous administration.
- Hired executive coaches for two director-level staff members
- Surveyed staff using Gallup tool to measure employee engagement. Baseline established.

- Created a $10,000 COVID fund for use by staff to upgrade services to work from home, or stay in touch with Monroe (cell phones for housekeeping staff, installation of internet, etc.)
- Designed new organizational structure that was scalable post-app launch
- Commissioned study of job descriptions and pay parity
- Adopted best practices for performance review process and forms (in process)

Operations
- Refurbished DFH due to age (discovering mold in the process)
- Started refurbishment of NPC due to age (discovering health, fire and electrical problems in process)
- Redesigned DFH and NPC with professional designer to update look and functionality
- Planned for post-COVID of physical campus
  - Green footprint
  - Air flow, improved and adjustable by CHEC unit
  - Single rooms with individual bathrooms
- Created detailed maintenance schedule of entire campus to determine more precisely the timing and costs of future repairs and maintenance (in process).
- Inspected NPC building for code violations (resulting in over 150 pages of items needing attention)
- Developed philosophy of food at Monroe
- Planned for reducing our carbon footprint with facility upgrades
- Followed through on major functional risk—water tank installed, designed protective fencing.
- Harvested timber with a plan for sustainable growth and use of trees
- Negotiated with logging firm: timber harvest staging area to be groomed and repurposed for a new parking lot. This new parking lot will allow staff parking to not violate fire codes.
- Upgraded Gatehouse for staff offices
- Named Gatehouse for super volunteer, Susan Smily
- Landscaped NPC to eliminate future water intrusion
- Repaired RMR house and Annex roofs, which were rotten from long neglect
- Designed more accessibility to NPC: bathroom adaptations and wheelchair paths. RMR: railings, wheelchair paths to cabin and dining room, etc.)
- Sourced stress indicators studies for lighting selection in DFH. (Less blue light)
- Drafted COVID reopening protocols
- Created housekeeping protocols for thoroughness and accountability
- Created productivity studies for
  - Kitchen (redesign resulted)
  - Housekeeping (checklists)
    - Use of commercial dryers saving 7 hours per turnover
    - Designated space for working, storing (library, lower level of NPC)
- Adopted work-from-home policy
- Spent money on productivity tools resulting in both short- and long-term savings
  - Second monitors
  - Software
- Commissioned cost savings plan for facilities
  - Solar (heat water)
  - Mechanical (have each building on its own system)

- Tolerated no more "value engineering" (shoddy workmanship), which results in major expense to fix in the future
  - Use good materials
  - Use competent contractors
- Detailed a list and ranking of 20 years of deferred maintenance so it could be addressed preemptively and cost-effectively
- Reduced inventory levels in bookstore during COVID shutdown
- Changed inventory philosophy to reflect sales history vs. "never out"
- Removed overgrown landscaping to reduce damage to buildings and eliminate plants that house snake nests.
- Landscaped to divert water from:
  - Parking lot away from NPC
  - Parking lot away from the bottom of the main entrance ramp
  - Lawn and path away from the main entrance of the Lab
- Changed type and installation of shingles on buildings to reduce their being easily blown off the roof causing water damage and repair costs.
- Designed new steps/ramp/loading dock for NPC to increase safety and ease of use.
- Designed new signage consistent with brand and to increase clarity of directions.

Board
- Scheduled monthly governance issues for the next three years
- Advocated for hiring Board governance consultant
- Built a job description for ED and Board members

Management
- Identified and used Key Performance Indicators (KPIs) for past performance
- Pioneered use of leading indicator KPIs
- Start meetings with meditation / intention to further Monroe culture / use of tools
- Created two new / professional conference rooms. Better communication. Decrease silos.
- Planned for research division and Professional Association future
- Encourage culture of YES, self-initiative and self-empowerment
- Published 100+ "Reflections" emails to staff, with affirmative content and accomplishment updates. This was a necessary communications tool with everyone working from home (March 2020 to March 2021)

It was a team effort.

All this was accomplished amid a pandemic, the worst recession in 100 years, when residential programing, responsible for 77% of income, was closed. An appropriate leadership philosophy is key.

In times of great stress, everyone in the organization needs to feel their creativity will have an impact on saving the organization. The best ideas come from every level of the organization.

Silos kill. Creativity wins. Team spirit helps everyone through.

It was a team effort.

Thank you, everyone, for your wisdom, contributions and willingness to embrace an uncertain future.